| Job Aid: Catalog Management | PBL Course: Catalog Management |
| --- | --- |
| | Learning Needs Mgmt Lab 8: Add Curriculum to a Catalog |

## Prerequisites

- Introduction to Plateau Administration
- Introduction to Learning Needs Management
- Assignment Profiles

## Description

The purpose of this job aid is to guide administrators through the step-by-step process of creating and modifying catalogs, adding items and curricula to catalogs, and associating catalogs to assignment profiles.
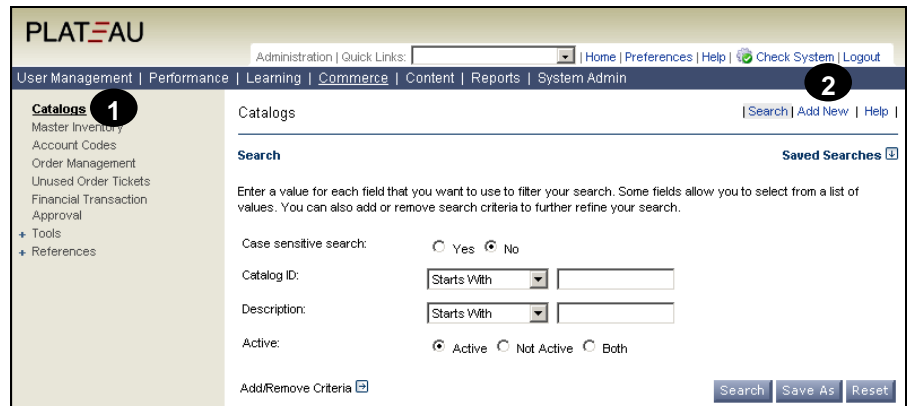
## Tasks

A. Adding Catalogs
B. Adding Items to Catalogs
C. Adding Curricula to Catalogs
D. Modifying Item/Curriculum Catalog Flags
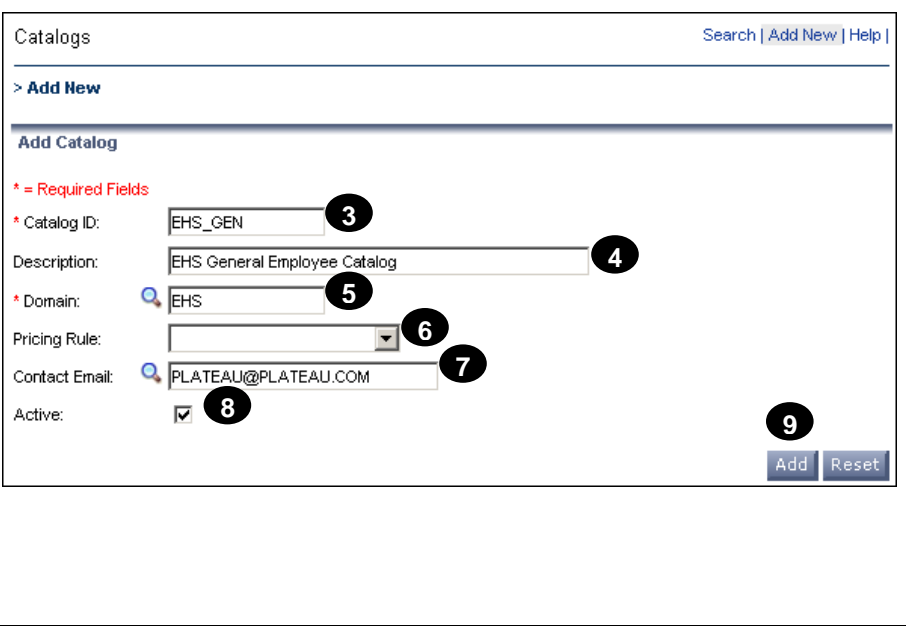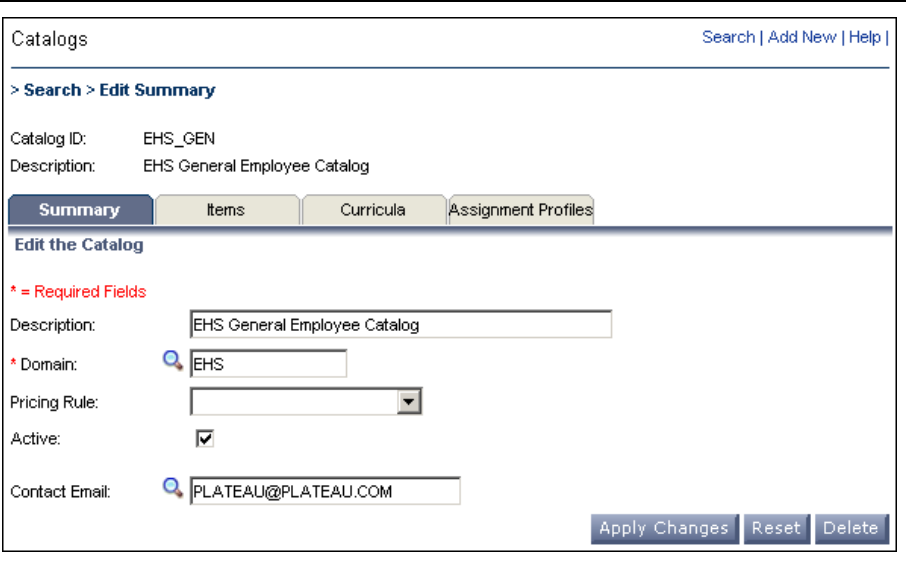E. Associating a Catalog to an Assignment Profile

| Task A: Adding Catalogs | |
| --- | --- |
| ❶ Navigate to **Commerce > Catalogs**. ❷ Click the **Add New** link. |  |

| | | |
|---|---|---|
| **3** | Enter a catalog ID. | |
| **4** | Enter a description of the catalog. | |
| **5** | Select a domain. | |
| **6** | Select a pricing rule from the drop-down menu, if applicable. | |
| **7** | Enter contact email. | |
| **8** | Verify the **Active** checkbox is selected. | |
| **9** | Click **Add**. | |
| | The new catalog is successfully added. | |

## Task B:   Adding Items to Catalogs

| | |
|---|---|
| **1** | Navigate to **Commerce > Catalogs**.<br><br>Search for a catalog by entering criteria for one or more fields.<br><br>For this example, let's search for the catalog created in the previous exercise. |  |
| **2** | Enter the catalog ID in the Catalog ID field. | |
| **3** | Click **Search**. | |
| **4** | Select the catalog by clicking the **edit icon** (icon). |  |
| **5** | Select the **Items** tab.<br><br>*Note: Items can be added to the catalog by either entering or searching for an item SKU number, or entering or searching for an item.* |  |
| **6** | Select an item type from the drop-down menu. | |
| **7** | Enter the exact item ID.<br><br>**or** | |
| **8** | Click the **add one or more from list** link to search for and add the item. | |
| **9** | Click **Add**. | |

| | | |
|---|---|---|
| **10** | The item is successfully added to the catalog.<br><br>Click the **expand icon** (⊞) to view any associated scheduled offerings. | **Update the Items in the Catalog**<br><br>Apply Changes  Reset<br><br>Select All / Deselect All<br><br>| SKU | Item | Title | Show in Catalog | Catalog Options | Price ($) | | Remove |<br>⊞ CAT-328 | COURSE **EHS-100** (Rev 4 - 5/14/2003 12:00 AM EST) | CPR Recertification | Yes | Flag: [ ▼ ]  Until: (MM/DD/YYYY) [ ]  Reason: [ ]  Expires: (MM/DD/YYYY) [ ] | 0.00 | change | ☐<br>**10** |

---

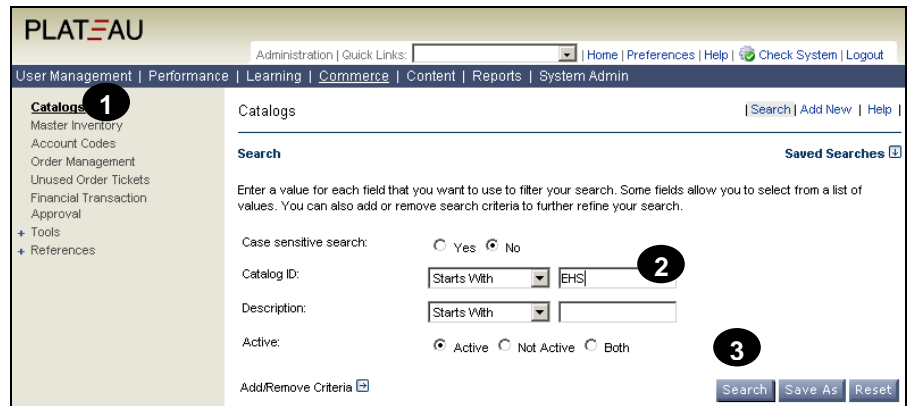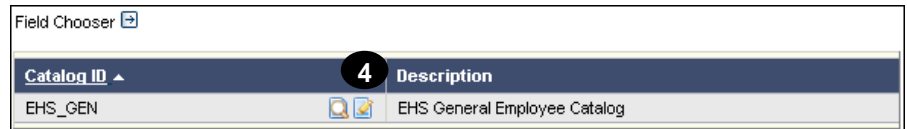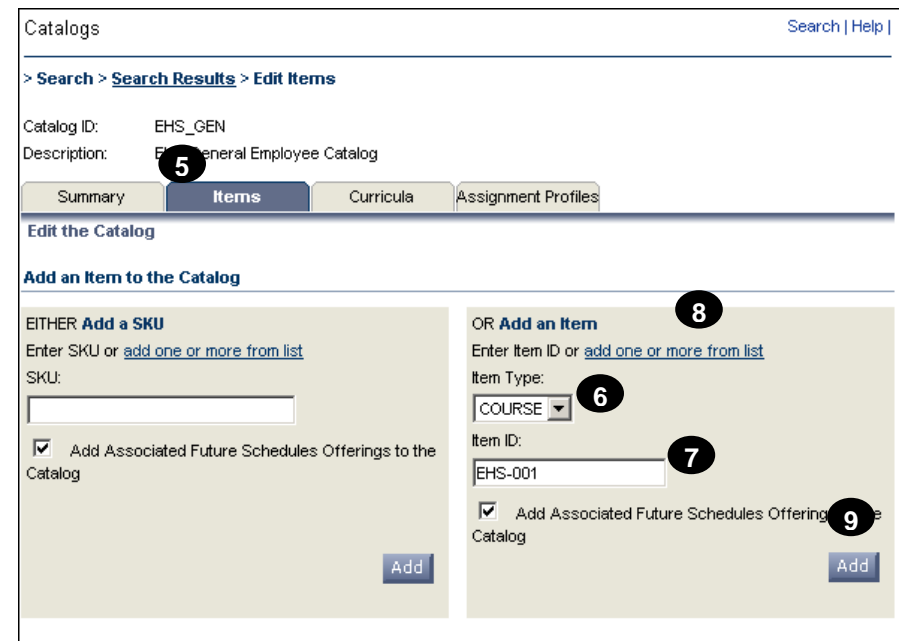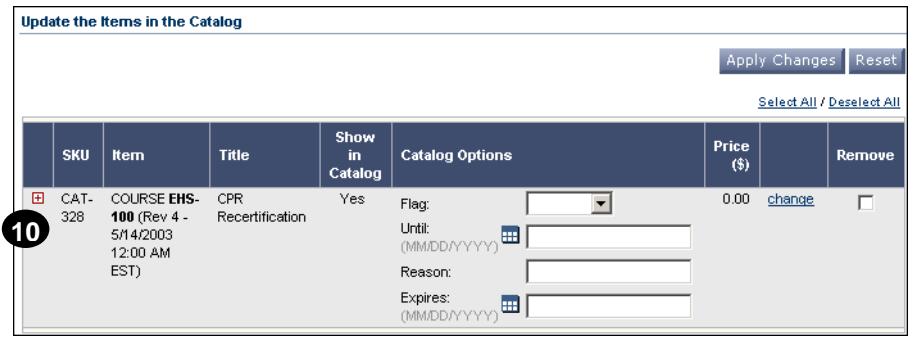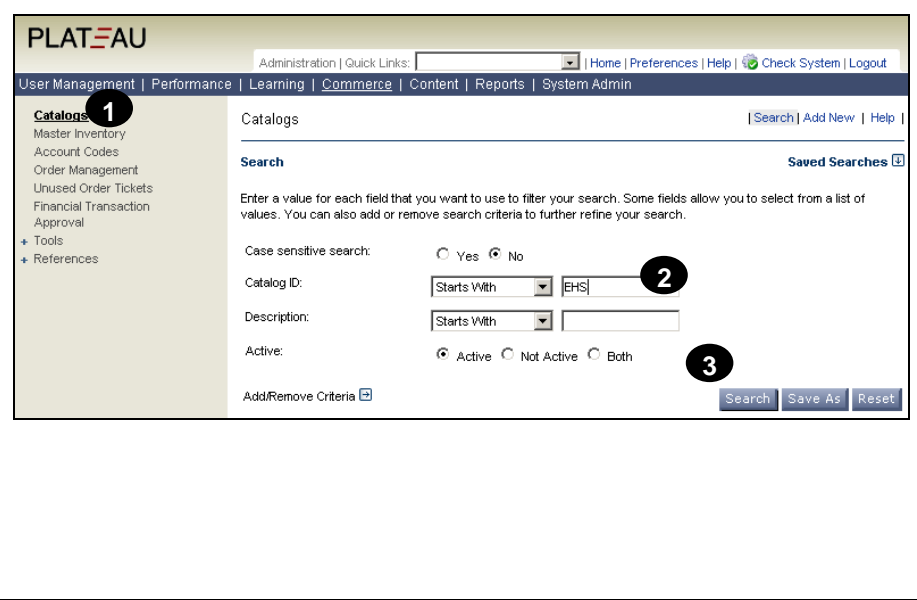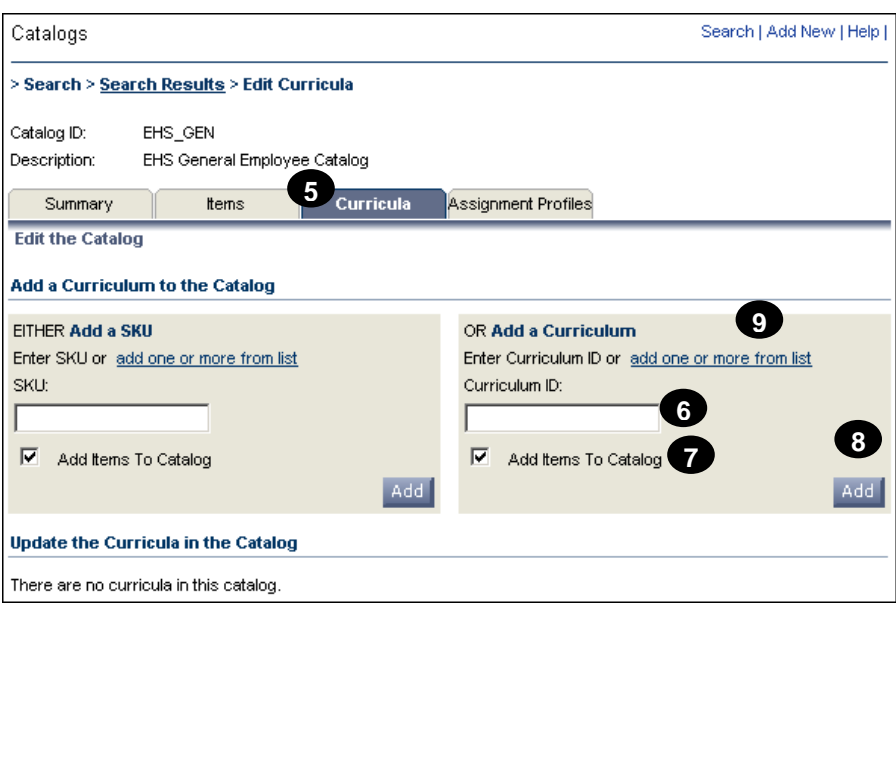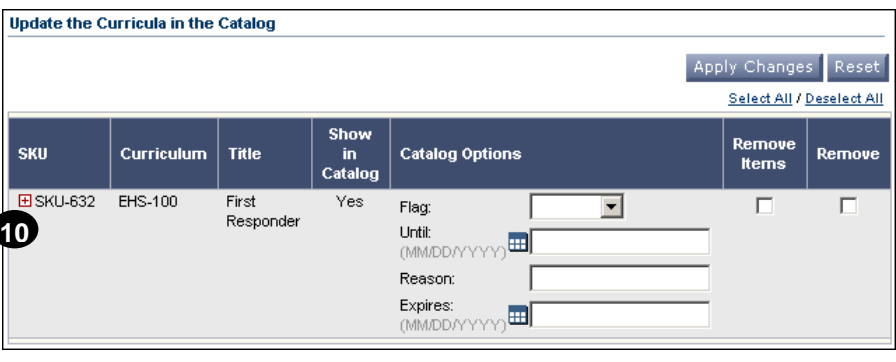| | | |
|---|---|---|
| | **Task C:   Adding Curricula to Catalogs** | |
| **1** | Navigate to **Commerce > Catalogs**.<br><br>Search for a catalog by entering criteria for one or more fields.<br><br>For this example, let's search for the catalog created in the previous exercise. | **PLATEAU**<br><br>Administration \| Quick Links: [ ▼ ] \| Home \| Preferences \| Help \| Check System \| Logout<br><br>User Management \| Performance \| Learning \| Commerce \| Content \| Reports \| System Admin<br><br>**Catalogs** **1**<br>Master Inventory<br>Account Codes<br>Order Management<br>Unused Order Tickets<br>Financial Transaction<br>Approval<br>+ Tools<br>+ References<br><br>Catalogs  \| Search \| Add New \| Help \|<br><br>**Search**  **Saved Searches**<br><br>Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.<br><br>Case sensitive search:  ○ Yes ● No<br><br>Catalog ID:  [ Starts With ▼ ] [ EHS ] **2**<br><br>Description:  [ Starts With ▼ ] [ ]<br><br>Active:  ● Active ○ Not Active ○ Both  **3**<br><br>Add/Remove Criteria  Search  Save As  Reset |
| **2** | Enter the catalog ID in the Catalog ID field. | |
| **3** | Click **Search**. | |
| **4** | Click the **edit icon** (✎) to select the catalog. | Field Chooser<br><br>| Catalog ID ▲ | | **4** | Description |<br>|---|---|---|---|<br>| EHS_GEN | 🔍 ✎ | | EHS General Employee Catalog | |

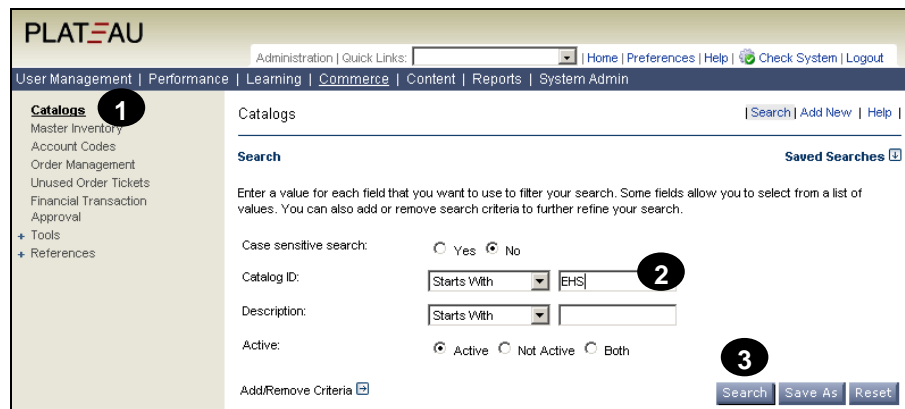| | |
|---|---|
| **5** Select the **Curricula** tab.<br><br>*Note: Curricula can be added to the catalog by either entering or searching for a curriculum SKU number, or entering or searching for a curriculum.*<br><br>**6** Enter the exact curriculum ID exactly.<br><br>**7** Verify the **Add Item to Catalog** checkbox is checked.<br><br>**8** Click **Add**.<br><br>**or**<br><br>**9** Click the **add one or more from** list link to search for and add a curriculum. | Catalogs      Search \| Add New \| Help \|<br><br>> Search > Search Results > Edit Curricula<br><br>Catalog ID:      EHS_GEN<br>Description:      EHS General Employee Catalog<br><br>**5** Summary      Items      Curricula      Assignment Profiles<br>**Edit the Catalog**<br><br>**Add a Curriculum to the Catalog**<br><br>EITHER **Add a SKU**      OR **Add a Curriculum** **9**<br>Enter SKU or add one or more from list      Enter Curriculum ID or add one or more from list<br>SKU:      Curriculum ID: **6**<br><br>☑ Add Items To Catalog      ☑ Add Items To Catalog **7**      **8**<br>Add      Add<br><br>**Update the Curricula in the Catalog**<br><br>There are no curricula in this catalog. |
| The curriculum has been successfully added to the catalog.<br><br>**10** Click the **expand icon** (⊞) to view all items within this curriculum. | **Update the Curricula in the Catalog**<br><br>Apply Changes   Reset<br><br>Select All / Deselect All<br><br>| SKU | Curriculum | Title | Show in Catalog | Catalog Options | Remove Items | Remove |<br>|---|---|---|---|---|---|---|<br>| ⊞ SKU-632 **10** | EHS-100 | First Responder | Yes | Flag: [ ▼ ]<br>Until: (MM/DD/YYYY) ▦<br>Reason: [ ]<br>Expires: (MM/DD/YYYY) ▦ | ☐ | ☐ | |

| | | |
|---|---|---|
| **Task D:** | **Modifying Item/Curriculum Catalog Flags** | |

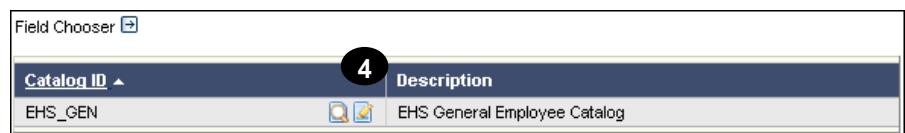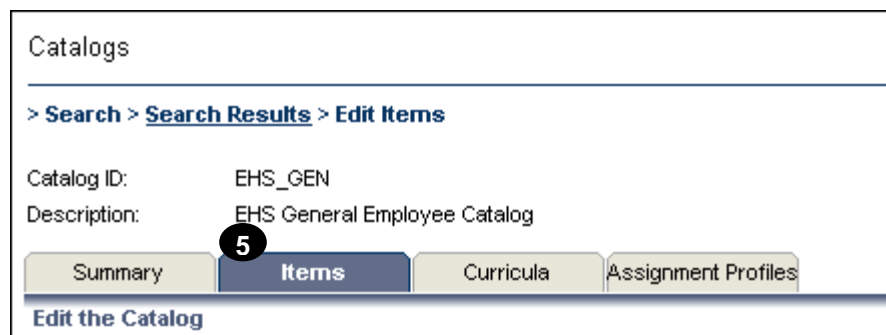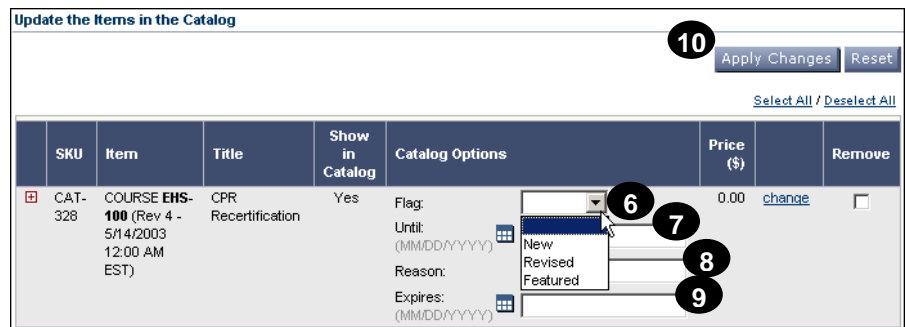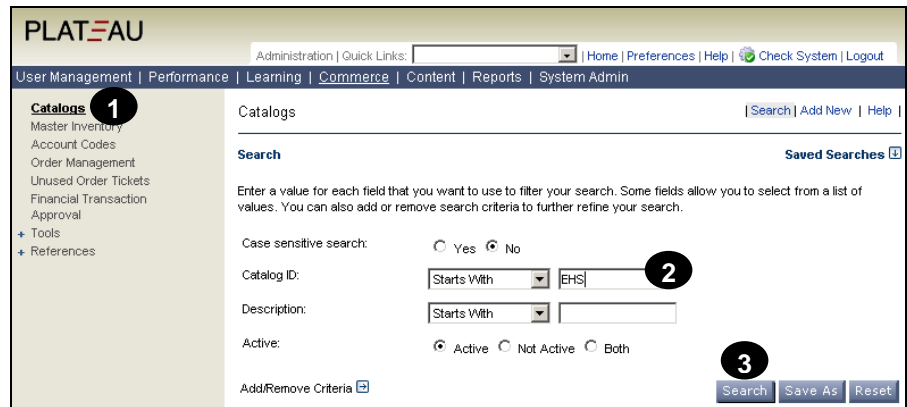| 1 | Navigate to **Commerce > Catalogs**.<br><br>Search for a catalog by entering criteria for one or more fields. |  |
| 2 | Enter the catalog ID in the catalog ID field. | |
| 3 | Click **Search**. | |
| 4 | Select the catalog by clicking the **edit icon** (✎). |  |
| 5 | Select the **Items** tab. |  |
| 6 | To modify catalog options per item, click the **Flag** drop-down box and select one of the displayed options. |  |
| 7 | Enter an **Until** date. | |
| 8 | Enter a **Reason**. | |
| 9 | Enter an expiration date (if desired). | ***Notes:***<br><br>*Item Flag: A flag that appears with the item in the catalog.*<br><br>*Until: The date that the flag no longer appears with the item in the catalog.* |
| 10 | Click **Apply Changes**. | *Reason: What the user sees for why they should be interested in this item when viewed on their home page or in the catalog.*<br><br>*Expires: The date at which the item is automatically removed from the catalog.* |

PLAT≡AU
Global University

---

| **Task E:   Associating a Catalog to an Assignment Profile** |
|---|

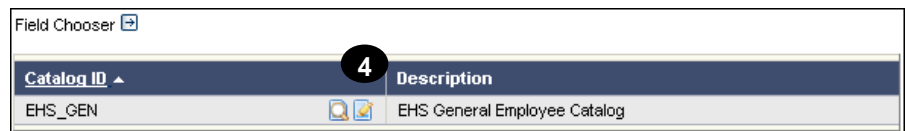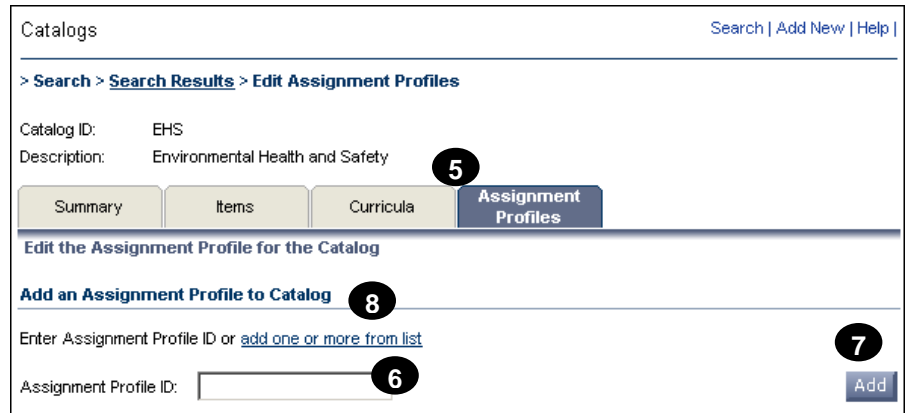| | | |
|---|---|---|
| **1** | Navigate to **Commerce > Catalogs**.<br><br>Search for a catalog by entering criteria for one or more fields. |  |
| **2** | Enter the catalog ID in the Catalog ID field. | |
| **3** | Click **Search**. | |
| **4** | Select the catalog by clicking the **edit icon** (✓). |  |
| **5** | Select the **Assignment Profiles** tab.<br><br>*Note: Access to catalogs is controlled by assignment profiles.* |  |
| **6** | Enter the exact assignment profile ID. | |
| **7** | Click **Add**.<br><br>**or** | |
| **8** | Click the **add one or more from list** link to search for and add an assignment profile. | |

---

**Notes**